State of Rhode Island
Department of Administration

INTER-OFFICE MEMORANDUM

Office of Accounts and Control

TO: Payroll / Personnel Officers   **DATE**: January 29, 2009
All Departments and Agencies

FROM: MARC LEONETTI
State Controller

SUBJECT: **2008 W-2 CORRECTION REQUEST FORM** (rev. 1/29/09)
CPO 09-07

Attached please find the instructions for correcting a W-2. Please print out these instructions for review.

The blank request form (W-2C Request Form-2008) is available in a downloadable excel format in the Forms section of the Controller's Office website in the Payroll Forms subsection.

Send your W-2 correction request form and backup information to:

> Office of Accounts and Control
> One Capitol Hill
> 4th Floor
> Providence RI 02908
> Attention: Malcolm Varadian / W-2 CORRECTION

Processed W-2 corrections will be sent to the agency from where they originated for distribution to the employee.

Please review the information provided and if you have any questions, contact Malcolm Varadian at 222-4997.

Office of Accounts and Control

INSTRUCTIONS FOR REQUESTING A CORRECTED W-2 (rev. 1/29/09)

For security purposes, if an employee needs a corrected W-2 the payroll or personnel office where the employee works must request it. Any request for a W-2 correction that does not originate from a payroll or personnel office <u>cannot</u> be processed.

Therefore you <u>must</u> include on the W-2 correction request form the name of the person who prepared the form, the name of the agency, and a telephone number where you can be reached.

As in the past, attach to the correction request form a <u>COPY</u> of the W-2 (or W-2's if more than one) issued to the employee for 2008. **Do not send in a W-2 correction request form without a <u>COPY</u> of the originally issued W-2 attached. A printout of the year to date earnings is not acceptable because the data is incomplete.**

Lastly, please use the names and box numbers listed below if you need to correct dollar amounts for any of the following categories:

- Deferred Comp   Box 12
- Tax Shelter   Box 12
- NON-ERS Retirement   Box 12
- ERS Retirement   Box 14
- Flex Plan   Box 14
- Fringe Benefits   Box 14
- Imputed Income   Box 14

Please continue on to the next page to see samples of the most common W2 errors and the easy solutions for correcting them.

Employee received one or more W-2's with a wrong Social Security Number but all of the wages were due and payable to the employee.

Solution: Prepare one request form with the following information:

> Name of Employee
> Employee Address/City/State/Zip
> Payroll Account Number and Budget Object Code
> Correct Social Security Number (Box A)
> Incorrect Social Security Number (Box B)
> **DO NOT FILL IN ANY WAGE DATA**

Employee received a W-2 with a wrong Name.

Solution: Prepare one request form with the following information:

> Correct Name of Employee
> Employee Address/City/State/Zip
> Payroll Account Number and Budget Object Code
> Social Security Number in Box A
> Incorrect Name of Employee in Box C
> **DO NOT FILL IN ANY WAGE DATA**

Employee received one W-2 with dollar amounts that are incorrect.

Solution: This situation will require you to send in a check change attached to the W-2 correction request. When you have prepared the check change documentation, prepare one W-2 correction request form with the following information:

> Name of Employee
> Employee Address/City/State/Zip
> Payroll Account Number and Budget Object Code
> Social Security Number (Box A)

> **For boxes 1 through 17, only make an entry in a box if you need to correct a dollar amount. Do not enter a dollar amount in any box that you do not need to correct. Therefore:**

> In the **PREVIOUSLY REPORTED** column of the request form, enter only the dollar amounts reported on the original W-2 that need correcting. Do not enter a dollar amount in any box that you are not correcting.

> In the **CORRECT INFORMATION** column enter only the amounts that you are correcting. Do not enter a dollar amount in any box that you are not correcting.